New Grantee Checklist
FTA Region IV

TEAM Access:

Please open PDF file (attached, below) and complete the following and return to FTA:

- ***TEAM Forms completed for each staff member for TEAM access to obtain a "log in & password" for web based TEAM application***

- ***Resolutions completed by Grantee Board for TEAM signature and grant making authority (see <u>Appendices 1 and 2</u> in attached file and use narrative as "go by" as written only)***

team user access
form 2-13-07.pdf

- TEAM Access forms completed by grantee and processed by FTA Region IV
    a. Log ins and passwords provided to new grantees
    b. Staff log in and passwords tested by grantee
    c. Attorney log in and passwords tested by attorney

- ***TEAM Recipient ID paper form completed and FAXED back to FTA***
    a. ***NOTE: This is a paper form available by FAX from Region IV***
    b. ***May be sent by separate e mail***
    c. ***Complete form and FAX completed paper form back to 404.865.5605 FAX to Jeffery Anoka***

- Recipient ID # issued by FTA Headquarters (up to 3 weeks)

- Once Recipient ID # is issued, grantee may begin to access TEAM

Using FTA TEAM Web:

- Go to FTA web site http://www.fta.dot.gov/ and type in TEAM Web in Search portal; log into TEAM using log in and password

- From TEAM Main Menu page, scroll down and find **User's Guide**

- Print off and review TEAM User Guide on FTA web site (appropriate chapters)

    TEAM-Web User's Guide provides detailed information on how to access and use the Federal Transit Administration's online TEAM-Web system

- Review New Grantee Workbook sites (2006)

http://www.fta.dot.gov/documents/NewGrantee_Workbook.pdf
http://www.fta.dot.gov/documents/NewGranteeWorkbook_Appendix.pdf

- Once the above sources are reviewed, begin in TEAM by adding Recipient Info

    - See Chapter 2 in User's Guide
    - Load Recipient Info into TEAM
    - Add Recipient ID #
    - Add Contact Information for key staff of grantee in TEAM
        - For Union Information, click on Contact Information drop down box; click on Unions
        - Add Union contact info. or "no transit unions" 000 as appropriate
    - Click on Certifications and Assurances
        - read and review and "click" on all that are applicable to you
        - have key staff and attorney (identified by title) in your resolution "pin" and certify grantee compliance from their computer
    - Develop Civil Rights plan and submit to FTA Region IV (Frank Billue, Civil Rights 404.865.5628) for review
        - FTA Civil Rights officer will review and indicate compliance
        - DBE plan may also be required by Civil Rights officer

- FTA Region IV legal and Civil Rights officers will review above in TEAM

- Review Chapter 3 in the User's Guide for developing a new project, then load DRAFT application in TEAM
    - Click on Applications
    - Click on Create New Project
    - Assign a DRAFT ID # to application like NC-OTR-0001 or NC-5307-001 (examples)
    - Load Project Information narrative in appropriate boxes
    - Load Project Details narrative
    - Load Scopes & Budget & appropriate Activity Line Items (ALI) from User's Guide (see Appendix G in User's Guide)
        - Each appropriate Scope code must be selected from Appendix G
        - Under appropriate Scope code, an activity line item (ALI) must correspond to an FTA approved ALI in the project budget
        - Complete extended budget descriptions as necessary
        - Add environmental finding classification
        - Add fuel code if buying vehicles
        - Save your work and review once saved in TEAM

- Application Reviewer: From Main Menu (left side of TEAM screen) to check:
    - Select Application
    - Select Modify Application
    - Select Application Reviewer

- o Make sure Budget #'s add up
- o Make sure all Milestones have dates in sequential order and are completed (or reviewer will prompt you)

- Once DRAFT application is done and saved, ask FTA Region IV for a Review
- FTA Region IV will review for factors like
  - o Approved NC STIP date and program page (statutory); most programs; not OTR Bus
  - o Section of law, 5303, 5307, 5309, 5310, OTR 3038 SAFETEA LU, TTP 3013 of SAFETEA LU, etc. per applicable grant program
  - o Funds available for approved grant activities
    - FTA will review for apportionment amount
    - DR status, NC DOT bus and bus facilities earmarks, eligible activities, correct scope & ALI; grant share percentages, etc.
- FTA will make comments and place comments in TEAM for review by grantee
- FTA will ask grantee to make changes
- FTA will ask grantee to add necessary information, if any
- Once complete, FTA will assign a Project ID #
- FTA will ask Grantee to "Submit"
- FTA will send application to DOL for review as applicable
- DOL review may take up to 30 days
- Once certified by DOL, FTA will review once more
- IF OK, FTA will approve
- Grantees will be asked to execute the grant

Project Management

- Once awarded, the Project Management office of FTA will work with grantees to make quarterly and annual reports
  - o Financial Status Reports
  - o Other Reports
- Apply for and Receive an Echo #
- Allows electronic transfer of funds
- Draw down funds from ECHO system
- Continue to account for funds